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PLUS
MARKETING
Cable growth in the U.K. and Europe

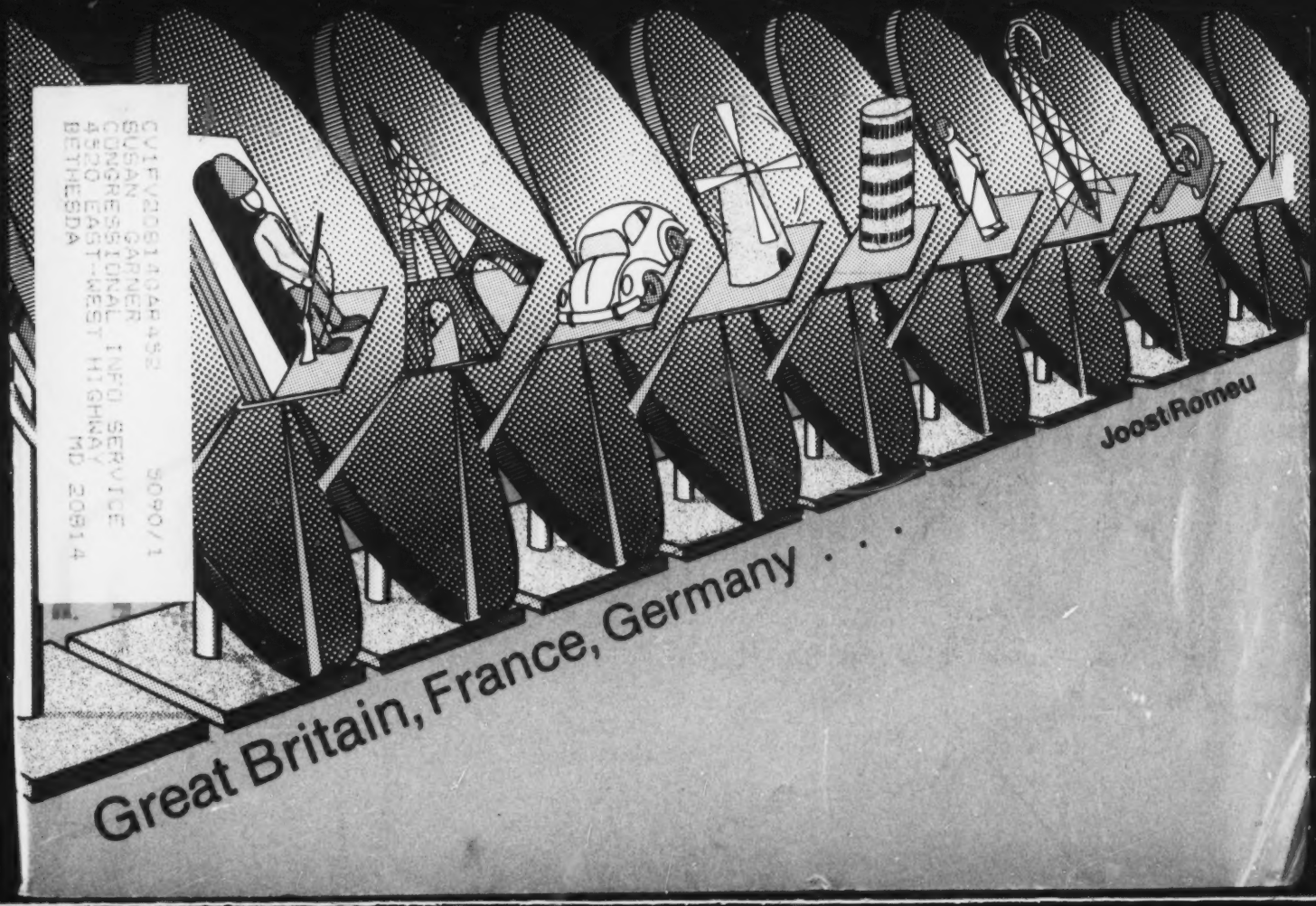
- B'casters talk copyright compromise on Hill
- Pacific Bell mulls PPV deals with ops
- HBO seeking wider home video market
- SCTE talks high tech in Nashville

CableVision™

The news and features weekly of the cable television industry

March 5, 1984

Cable overseas: The new frontier



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CableVision

The Week in Cable, pages 14-20

March 5, 1984, Volume 9, Number 27

COPYRIGHT COMPROMISE BREWS

Broadcasters took some pot shots at bills designed to ease the burden of rising copyright fees on cable, then hinted they'd be willing to compromise, at a House hearing last week.

CALIF. WINS ANTITRUST IMMUNITY

A U.S. district court judge dismissed an antitrust suit brought by an aspiring cable operator against a California town. However, a First Amendment suit is still alive and kicking—an unprecedented case for the industry.

A WINNER IN ST. LOUIS

In St. Louis, STL Cablevision Partners narrowly won the recommendation of the city's cable consultant over St. Louis City Communications.

HBO EXPANDS VIDEO DISTRIBUTION

Time Inc.'s Home Box Office is negotiating with a number of companies to broaden home video distribution of its product.

COLO. FRANCHISE RULE UPHELD

A Feb. 21 Colorado State Supreme Court decision upheld lower court rulings that invalidated a cable franchise granted by the City of Cortez to Community Tele-Communications Inc. The Court ruled that the ordinance granting the franchise is unconstitutional because Cortez did not gain the approval of Cortez voters.

SCTE CABLE-TEC EXPO '84

The SCTE is expecting this year's Cable-Tec Expo to be "a banner expo" for the organization. So far, 1,000 engineers and technicians have registered for the show and the exhibit floor, with 175 booths already reserved, is close to being filled to capacity.

What's in the Sections

PROGRAMMING 25

Busines Times, ESPN's weekday morning news program, is marking the end of its first year this week. Looking ahead, the *Business Times* staff is concerned with fine-tuning their product while aiming for profitability by the end of 1984. Plans for expansion and development of other cable programs are in the works.

MARKETING/ADVERTISING 26

In what is believed to be the first strategy of its kind, Pay-Per-View Associates will deliver an entire pay-per-view event, including decoders, insurance, and all on-air and print advertising at no additional charge to the cable operator. This package is being offered for the April 6 IBF Heavyweight Championship fight between Larry Holmes and John Tate, but only to systems in the Southern California area, in an experiment.

BUSINESS 43

CableEntertainment is slated to complete the acquisition of Atlantic City's Atlantic Coast TV Cable Corp. sometime this spring in the wake of a limited partnership offering it hopes will bring in some $11.7 million in equity. CableEntertainment, which announced plans to acquire the system last year, plans a total system upgrade.

GOVERNMENT & LAW 47

The franchise process, stalled in Palo Alto, Calif., since last fall, will be delayed a bit longer while a U.S. district court ponders whether cable operators have the right to do business without the blessing of local authorities—that is, *without* a franchise.

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pages 27-42 **PLUS**

Cable operators in the U.K. take a risk. . .

Beginning this March, some cable operators will give up all of their customers in a gamble to get more in return. The reason for this mass exodus is the primitive technological state of the nation's existing cable operation. English investors, too, will take a risk by financing services that will cost over £200 million to construct.

. . .as European cos. gear up for cable's arrival

Perhaps predictably, opinions about the European cable market run the gamut from exuberance to skepticism. Despite volumes of studies, financial models and analyst projections, uncertainty persists about the overseas market. But whether sanguine or cautious, most companies agree that doing business in Europe requires some adaptation.

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BPA

PLUS

U.K. cable risks

Beginning this March, some cable operators will give up all of their customers in a gamble to get back more in return

By Eric Taub

In *The Actor's Nightmare*, a recent off-Broadway play by writer Christopher Durang (*Sister Mary Ignatius*), the main character suddenly finds himself on stage without knowing his lines or even in which play he is acting.

Now imagine the *Cable Operator's Nightmare*. One day the system manager walks into his office to find that he is suddenly left without any subscribers.

That's exactly what is about to happen in Great Britain. Beginning this March, some cable operators will give up all of their customers in a gamble to get even more back in return.

The reason for this mass exodus is the primitive technological state of the nation's existing cable operations. As in the United States, cable developed in Britain solely as a method of improving broadcast reception. But whereas North American cable utilized coaxial cable, England's earliest cable networks use the antiquated twisted-pair technology, with limited four-channel capacity.

And today, those four channels are taken up with the transmission of the four existing broadcast networks: BBC One and Two, a local ITV station (depending on the area, a viewer may see Harlech TV, Granada, or Anglia TV, to name a few), and the newest commercial offering, Channel Four.

But while the channel capacity of cable has remained the same, the country's need for cable to improve reception has decreased.

The government is committed to improving off-air reception, and today provides a large number of transmitters and relay stations throughout the country. Even as few as 200 homes are equipped with a transmitter, according to Frank Hall, the managing director of Visionhire Cable, (one of the nation's largest existing MSOs, with 50 systems and 275,000 current subscribers).

With generally excellent off-air reception, the government has now granted a waiver to the existing, low-channel capacity systems to remove the off-air, former must-carry's from their systems to make room for a package of new basic and pay services that will be available as early as next month.

Consequently, while there are over 2.4 million cable subscribers in the U.K., all of those customers will have to be remarketed once a basic program package is introduced. The situation is further complicated by the age of some of the systems. Some may never offer a basic package, as the state of the system will not warrant an expensive investment in hardware to upgrade it. "I think that the announced conversion of between 1.2 and 1.5 million homes to receive the new channels is an extremely optimistic figure," according to Richard Wolfe, head of Thorn-EMI's basic cable ventures in music and children's programming.

The first to offer U.K. citizens new services will be the nation's largest MSO, Rediffusion. Beginning March 1, Rediffusion will convert up to 16 systems, equivalent to 300,000 homes passed. That number is expected to rise to 500,000 later in the spring, and to 1.3 million by early 1985.

Some of the first systems to offer basic and pay programming include Reading, near London; Plymouth; Middlesborough; Billingham; Southhampton; Brighton; and the Welsh towns of Rhondda and Swansea.

Visionhire, itself partnered with Rediffusion and others in the T.E.N. pay television network, will begin offering a basic package as soon as April, to two yet-to-be-announced systems, passing a total of 120,000 homes. An additional five or six systems will be added in the following months, according to Visionhire's Hall.

Rediffusion will most likely charge one price for a three-channel basic package, and an additional fee for the T.E.N. premium service. Basic will go for £4.90 ($6.86) with the entire package priced at £12.90 ($18.06). Basic service is necessary to receive pay.

Visionhire will charge between £5.50-£7.50 ($7.70-$10.50) for three basic services, and £12-£13 ($16.80-$18.20) for basic and pay.

The upgrading of systems entails the installation of headend equipment, two satellite dishes, and channel converters. As only one pay service will be available on these older systems, Visionhire pay customers will be equipped only with a simple inexpensive converter.

Visionhire's Hall estimates conversion costs to be in the "five figure range" per system. And Rediffusion will be spending 6 million pounds for the conversion of all of its systems, according to a company spokesman.

A host of basic and pay services have been announced in the past few months, with some available today and serving subscribers in smaller markets, while others are gearing up their efforts to coincide with the Rediffusion introduction of basic.

Just last summer, wildly optimistic claims about the availability of program services and the predicted positive consumer reaction to the introduction of cable were being bandied about at British trade association gatherings. But in just the space of a few months, that talk has diminished considerably, according to observers.

As a result, a number of services have looked to the possibility of joining up with other companies that hope to offer the same kind of services. The aim is to lower costs and prevent a potentially fatal shoot-out in a marketplace that more and more players are beginning to realize may have great difficulty in even supporting one service of its kind.

Rediffusion will begin its new expanded operation by offering subscribers Screensport, an all-sports service; Skychannel, a general interest channel featuring off-network programming; and The Music Channel, an MTV-like music service.

In addition, Rediffusion will market T.E.N., the pay service jointly owned by itself, Visionhire, Plessey, Rank, Trident and a grouping of three U.S. motion picture studios: MGM, Paramount, and Universal, through VIP, their existing European distribution joint venture.

HBO and Goldcrest Films are developing their own pay TV service. And Thorn-EMI will market its Premiere pay service sometime in the second quarter of this year, according to Richard Wolfe.

Major cities of the United Kingdom

While all of the above basic services will be available when Redifussion begins to sell basic, many of the venture's marketing plans remain ill-defined. Rediffusion will hire an additional 1,700 door-to-door salespeople, of which a "significant proportion" will remain as permanent staff. The company will position its new services as providing more and better television, but to date, few concrete strategies have been resolved.

Here is a summary of Britain's announced basic program services, due to go on-line this March:

■ **The Music Channel**—The Yorkshire Television/Virgin Records venture looks to be about to break the precedent set by MTV in the U.S., by agreeing to pay record companies for all the music video clips which it licenses.

"We've always said that we would pay for our video clips. If you don't pay the record companies for their product, then you don't get to program the service," said the venture's managing director, Clive Leach. "I want to provide viewers with the right service. If the clips we use are free, then we won't always get all the product that is potentially available."

The service will offer program fare much like that of MTV, "with a few differences. There will be a little chat, but not below 70 percent music."

Marketing will be done both in conjunction with the local operator and by The Music Channel's co-parent, Yorkshire Television, which will produce promo and demonstration tapes, as well as subscriber-oriented marketing events.

The company also has a ready asset in its association with Virgin Records, through the latter's 100 retail stores. "Traffic in those stores is colossal," Leach said. "We'll be heavily merchandising the service there."

Programming will run five and one-half hours per day, with two additional repeats of the segment daily. Leach expects the audience to

be similar to that of MTV's: between 10 and 25 years old.

■ **The Music Box**—Executives of this Thorn-EMI MTV-like service are now in discussion about the possibility of joining forces with The Music Channel. Thorn-EMI is currently in a one-year deal to supply three hours of music programming per day to the Skychannel DBS service. If the company does not merge with The Music Channel, it will then offer its own service to the six existing Thorn-EMI cable systems.

■ **Skychannel**—The Rupert Murdoch-owned DBS service has been in operation in Europe for the past 18 months, currently reaching 654,000 cable homes in Norway, Finland, Switzerland and France, plus an additional 3,000 hotel rooms.

The company expects most of the service's growth to occur for the short term in Germany and the Netherlands, and is looking for a 2.5 million home reach by the end of this year.

While the service is free to cable operators on the continent, British cable operators will be charged 10 pence (14 cents) per subscriber per month, according to a company spokeswoman.

Programming consists of "general interest" shows, including such American network favorites as *Charlie's Angels, Starsky and Hutch*, and *Fantasy Island*, in addition to Australian miniseries.

The company has invested more than 9 million pounds ($12.6 million) in the service to date, and spends between $2,000-$3,000 per hour on programming, which is uplinked via the European ECS-1 satellite, and scrambled using Oak's Orion system.

The service offers five hours of programming per night, but will increase that to six hours in February and eight in April. Six minutes per hour are available for advertising spots, which to date have attracted such multinational advertisers as Coca-Cola, Ford, Kelloggs and Pepsi. Between one and three minutes per hour are currently filled. The service expects to be in the black by 1986.

■ **Screensport**—an all-sports service jointly owned by Marketing head Christopher Howland, producer distributor Richard Price, Bob Kennedy, and ABC/ESPN. ABC/ESPN jointly own approximately 35 percent of the service. In addition, the venture is currently in negotiations with another British company to acquire part ownership.

While football (soccer) remains as the most popular sport in the U.K., English football (soccer) league rights remain in the possession of the BBC. (Britain has two football leagues, the English and the Scottish.)

Consequently, programming will initially consist of a number of historical matches, and events purchased from overseas. Included in the current line-up of the six-hour programming block are boxing, baseball, American football, horse and greyhound racing, as well as historical matches from Wimbledon and the British Open.

The company is also looking to acquire soccer from Germany and Italy, Australian cricket, and Australian rules football.

In addition, a continuous, up-to-the-minute text crawl will keep viewers informed of the latest results of events for which the channel has not secured licensing rights. The company hopes that this tactic will lessen the impact of the absence of those matches. ■

New cable franchises granted in the United Kingdom

Name:	Swindon Cable Services
Homes passed:	56,000
Configuration:	Tree and Branch, with experimental fiberoptic
Basic channels:	12
Price/Month:	$5.60
Cost:	$18.2 million
Name:	Merseyside Cablevision
Homes passed:	100,000
Configuration:	Switch star, with fiberoptic trunk and coaxial drops
Basic channels:	7
Price/Month:	$12.60
Cost:	$7 million
Name:	Ulster Cablevision
Homes passed:	130,000
Configuration:	Switch star; fiberoptic main trunk
Basic channels:	12
Price/Month:	$11.20
Cost:	$7 million
Name:	Clyde Cablevision (Scotland)
Homes passed:	114,000 (initially)
Configuration:	N.A.
Basic channels:	N.A.
Price/Month:	$11.20
Cost:	N.A.
Name:	Rediffusion Guildford
Homes passed:	23,000
Configuration:	Switch star
Basic channels:	16
Price/Month:	$11.20
Cost:	N.A.
Name:	Cabletel Communications (EALING)
Homes passed:	100,000
Configuration:	Switch star, with fiberoptic to mini-hubs
Basic channels:	13
Price/Month:	$14
Cost:	$35 million (including construction)
Name:	Coventry Cable
Homes passed:	112,000
Configuration:	Tree and branch
Basic channels:	14
Price/Month:	$8.40
Cost:	$5.6 million
Name:	Westminster Cable Company (London)
Homes passed:	73,000
Configuration:	Fiberoptic trunk, coaxial drops
Basic channels:	20 (in three tiers)
Price/Month:	$14
Name:	Croydon Cable Ltd.
Homes passed:	114,000
Configuration:	Coaxial
Basic channels:	17
Price/Month:	$7
Cost:	$35 million (including construction)
Name:	Windsor Television Ltd. (Windsor, Slough, and Maidenhead)
Homes passed:	N.A.
Configuration:	Switched star
Basic channels:	N.A. (30 channel capacity)
Price/Month:	$14
Cost:	N.A.
Name:	Aberdeen Cable Service, Ltd.
Homes passed:	90,000
Configuration:	Coaxial, Hub distribution
Basic channels:	13 (basic)
Price/Month:	$9.80
Cost:	$4.2 million

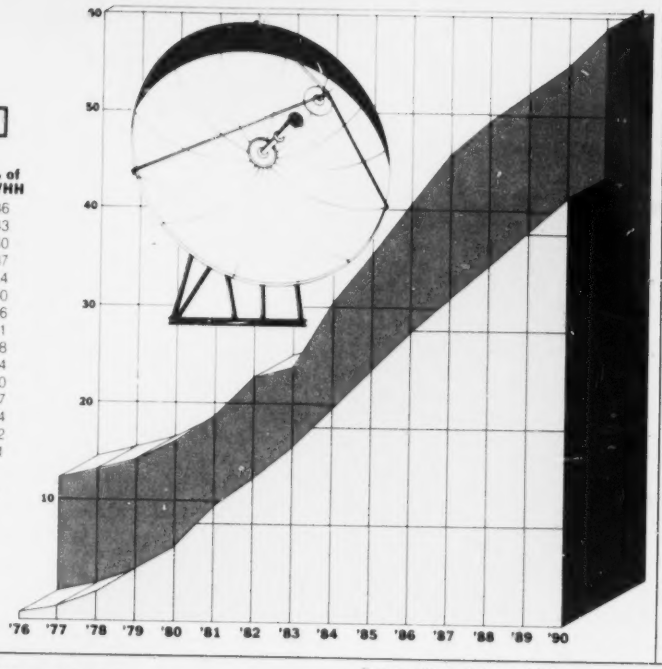
CABLE STATS

Pay/basic cable growth

Legend: Pay Subs ■ Basic Subs □

Year	Basic Subscribers	% of TVHH	Pay Subscribers	% of TVHH
1990	58,900,000	62	43,700,000	46
1989	54,988,000	59	40,076,000	43
1988	52,098,000	57	36,560,000	40
1987	49,280,000	55	33,152,000	37
1986	45,656,000	52	29,852,000	34
1985	40,467,000	47	25,830,000	30
1984	35,448,000	42	21,944,000	26
1983	30,300,000	36	17,900,000	21
1982	26,016,000	32	14,634,000	18
1981	22,596,000	28	11,804,000	14
1980	18,672,000	24	7,780,000	10
1979	16,023,000	21	5,341,000	7
1978	14,155,000	19	2,980,000	4
1977	13,194,000	18	1,466,000	2
1976	12,094,000	17	565,000	1

Pay, basic subscriber counts for 1984-1990 are projections.



Cable barometer

Television households (TVHH) .. 83,500,000

Homes passed by cable (HP) 53,641,000

Percent of TVHH passed by cable 64.2%

Basic cable subscribers 30,300,000

Percent of TVHH with basic cable .. 36.3%

Percent of HP with basic cable .. 56.4%

Pay cable subs 17,900,000

Percent of TVHH with pay cable 21.4%

Percent of HP with pay cable 33.4%

Percent of basic subs with pay cable 59.1%

Figures are as of Dec. 31, 1983.

Satellite lineup

Satcom III-R (RCA Americom)

	Transponder
AP News Cable	6
ARTS and Entertainment	1
Bonneville's Easy Listening (audio)	3
C-SPAN	19
Cable Jazz Network (audio service)	18
CBN Cable Network	5
Cable News Network	14
CNN Headline News	15
Cinemax (East)	20
(West)	23
Dow Jones Cable News (text)	
(United Video)	3
(Southern Satellite Systems)	6
EPG (United Video text)	3
ESPN	7
Eternal Word	18
HBO (East)	24
(West)	13
HTN	16
Keytax (text)	6
The Learning Channel	16
Lifestyle (United Video audio service)	3
Lifetime	17
Love Sounds (audio service)	8
Moody Bible (United Video audio service)	3
MSN—The Information Channel	22
MTV	11
National Jewish Television	16
Nice and Easy (audio service)	8
Nickelodeon	1
PTL	2
Quotrader (text)	6
Reuters News View (text)	18
(SSS)	6
Satellite Radio Network (audio service)	2
SCAN (audio service)	6
Showtime (East)	12
(West)	10
Showtime/The Movie Channel	5
Storytime (text)	8
UPI Cable News (text)	6
UPI Customized Cable News (text)	6
USA Network	9
(during blackout)	22
Video Concert Hall	16
The Weather Channel	21
WFMT (United Video audio service)	3
WGN (United Video)	3
WTBS (SSS)	6

Satcom IV (RCA Americom)

	Transponder
Bonet (Viacom)	
Bravo (ESPN)	15
Financial News Network (CBS)	2
Home Sports Entertainment-Dallas	4
Home Sports Entertainment-Houston	11
KKGO-FM	17
National Christian Network (daytime)	7
Playboy (evenings)	7
SCAN	12
SPN	3
Trinity	3
	17

Satcom V—Launched 4th quarter 1982; no cable.
Satcom I-R—Launched April 7, 1983; no national programming services.
Satcom II-R—Launched Sept. 8, 1983; no cable.

Westar IV (Western Union)

	Transponder
AmSat	5D
AmSat Digital Traffic	6X, 7D
Bonneville Satellite	
Cable News Network News Feeds	3D, 12X
Hughes Television Network	8X
SIN	1X, 2X, 7X
Wold Communications	3X
	6D, 9X, 10D

Westar V (Western Union)

	Transponder
The American Network	10X
AmSat DCM	7D
ARTS and Entertainment	12D
BET	12X
The Disney Channel (Wold Communications)	1X, 6X
Dow Jones	2X, 3X
Financial News Network	1D
Group W Satellite Corp.	7X, 8X, 11D, 12D
Madison Square Garden (Hughes TV Network)	8D
Nashville Network (Group W)	9D
National Jewish Television	12X
SelecTV (Wold Communications)	3D
WOR-TV (Robert Wold Co.)	2D

Comstar D-4 (AT&T/GTE)

	Transponder
Country Music Television	9H
ESPN	7V
ON TV	4V, 5V
The Silent Network	9H

Galaxy I (Hughes)

	Transponder
C-SPAN	13
The Disney Channel	20
GalaVision (SIN)	20
Group W Broadcasting and Cable	
HBO	2,8,12,22
Showtime/The Movie Channel	1,3,17,19,21,23
SIN	14
Times Mirror	6
Turner Broadcasting	5,10
Viacom	7,18
WOR-TV	14,16
	15

Note: A company name in parenthesis following a service or network designates the transponder owner.
Source: Tilson Communications Inc.

Top 100 MSOs

Rank	Multiple System operator	Basic subs	
1	Tele-Communications Inc.[1]	2,772,600	(10/83)
2	American Television and Communications Corp.	2,400,000	(12/83)
3	Group W Cable	1,950,921	(12/83)
4	Cox Cable Communications Inc.	1,457,914	(1/84)
5	Storer Cable Communications	1,371,000	(12/83)
6	Warner Amex Cable Communications Inc.	1,362,000	(12/83)
7	Times Mirror Cable TV Inc.	928,110	(1/84)
8	Newhouse Broadcasting[2]	788,125	(1/84)
9	Continental Cablevision	748,000	(12/83)
10	Viacom Cablevision	736,305	(1/84)
11	United Cable Television Corp.	620,000	(12/83)
12	Sammons Communications, Inc.	581,600	(1/84)
13	Rogers Cablesystems, Inc.	495,470	(1/84)
14	Cablevision Systems Development	405,000	(12/83)
15	TeleCable Corporation	388,473	(12/83)
16	Heritage Communications Group	370,154	(1/84)
17	Capital Cities Cable Inc.	351,118	(1/84)
18	Comcast Cable Communications	345,000	(1/84)
19	UA Cablesystems Corp.	341,000	(1/84)
20	General Electric Cablevision	322,600	(1/84)
21	Jones Intercable Inc.	286,102	(1/84)
22	Tele-Media	277,450	(12/83)
23	Century Communications Corp.	270,000	(1/84)
24	Prime Cable Corporation	261,570	(1/84)
25	Wometco Cable TV Inc.	256,390	(10/83)
26	Multimedia Cablevision, Inc.[3]	253,400	(1/84)
27	TCA Group	235,204	(1/84)
28	Centel Cable Television Co.	235,100	(12/83)
29	Daniels & Associates Inc.	231,364	(1/84)
30	Maclean Hunter Cable TV Ltd.	229,408	(12/83)
31	Service Electric Cable TV Inc.	189,500	(1/84)
32	Colony Communications Inc.	177,015	(1/84)
33	American Cablesystems Corp.	172,000	(12/83)
34	Rollins, Inc.	167,000	(1/84)
35	Tribune Cable Communications	147,822	(1/84)
36	Western Communications	146,946	(1/84)
37	Cable Vision Industries	144,672	(1/84)
38	Cablentertainment, Inc.	139,698	(12/83)
39	McDonald Group	139,585	(6/83)
40	Adams-Russell Communications	123,506	(12/83)
41	Harron Communications Corporation	121,066	(1/84)
42	Communications Service, Inc.	120,371	(3/83)
43	Midwest Video Corp.	114,615	(12/81)
44	McCaw Communications	114,000	(12/83)
45	Midcontinent Cable Systems Company[4]	111,571	(1/84)
46	Buckeye Cablevision	110,743	(1/84)
47	Televents Inc.	107,443	(12/83)
48	Sutton Capital Group[5]	106,235	(8/83)
49	Adelphia Communications	105,643	(1/84)
50	Falcon Communications	100,000	(12/83)
51	Harris Cable Corporation	98,000	(12/83)
52	Communications Systems, Inc.	94,935	(1/84)
53	Armstrong Utilities	93,090	(12/83)
54	Multi-Channel TV Cable Company	87,472	(12/83)
55	Lenfest Group	87,398	(12/83)
56	Total TV Inc.	87,384	(1/84)
57	Summit Communications	85,176	(1/84)
58	McClatchy Newspapers	80,184	(12/83)
59	King Videocable Co.	78,564	(12/83)
60	Perry Cable TV Corporation	76,943	(12/83)
61	National Telecommunications Corp.	76,655	(12/83)
62	Greater Media	76,551	(10/83)
63	US Cable Corp.	75,000	(11/83)
64	The Essex Group	72,587	(1/84)
65	WEHCO Video Inc.	71,951	(12/83)
66	Palmer Communications, Inc.	70,812	(12/83)
67	Booth Communications Company	69,500	(11/83)
68	Ultracom Inc.	69,382	(1/84)
69	Omega Communications	68,000	(12/83)
70	Acton Corp.	67,622	(12/83)
71	Sonic Cable TV	62,949	(1/84)
72	Phoenix Communications	61,000	(12/83)
73	Consolidated Cable Systems	59,865	(9/83)
74	Wabash Cablevision	59,000	(11/83)
75	Pencor Services, Inc.	58,430	(12/83)
76	Marsh Media	55,185	(12/83)
77	Omni Cable TV Corp.	53,927	(11/83)
78	Clear TV Cable Corporation	53,387	(7/83)
79	Selkirk Communications	52,200	(1/84)
80	The Daily Press	52,000	(11/83)
81	Susquehanna Broadcasting	49,541	(12/83)
82	Helicon Corporation	42,600	(12/83)
83	Communicom	42,444	(1/84)
84	Matrix Enterprises	41,710	(12/83)
85	Chambers Communications Corp.	40,631	(1/84)
86	Simmons Communications	40,440	(1/84)
87	Donrey Cablevision	40,038	(1/84)
88	Joseph Gans	38,901	(12/83)
89	National Cablesystems Inc.	37,035	(12/83)
90	Combined Cable Corporation	37,000	(1/84)
91	Harte-Hanks Communications	36,831	(7/83)
92	Masada Corporation	35,260	(12/83)
93	Scripps Howard Cable Services Company	35,000	(12/83)
94	New England Cablevision Inc.	33,498	(1/84)
95	MultiVision	32,614	(1/84)
96	Cable Holdings, Inc.	31,643	(12/83)
97	Wisconsin Cablevision and Radio Co. Inc.	31,605	(12/83)
98	Southern Cablevision	30,000	(4/83)
99	United Video Management	29,760	(12/83)
100	Mid America Media	29,285	(1/84)

1 Number is an estimate
2 Includes MetroVision, NewChannels, Vision Cable
3 Includes Tar River Communications
4 Includes systems owned and with controlling interest
5 Includes owned and partially owned systems
Source: Subscriber counts are provided by MSOs to Titsch Communications Inc.

Top 100 systems

Rank	Location	Operator	Basic subs	
1	San Diego, CA	Cox Cable	238,163	(1/84)
2	Woodbury (Long Island), NY	Cablevision Systems	220,000	(1/84)
3	Manhattan, NY	ATC	187,900	(12/83)
4	Houston, TX	Warner Amex	184,900	(1/84)
5	Florida Division[1]	ATC	179,800	(12/83)
6	San Antonio, TX	Rogers Cablesystems	166,341	(1/84)
7	East Orange, NJ	Maclean Hunter	156,410	(12/83)
8	Cincinnati area, OH	Warner Amex	134,290	(12/83)
9	Wayne, NJ	UA Cablesystems	127,000	(1/84)
10	Tulsa, OK	United Cable	110,809	(12/83)
11	Audubon, NJ	NYT Cable	110,275	(1/84)
12	Rochester, NY	ATC	108,600	(12/83)
13	Erie County, NY	Prime Cable Corp.	104,445	(1/84)
14	Baltimore County, MD	Caltec Cablevision	103,211	(12/83)
15	Tidewater (Norfolk), VA	Cox Cable	100,409	(1/84)
16	San Jose, CA	Gill Industries	100,300	(11/83)
17	Austin, TX	ATC	98,900	(12/83)
18	Honolulu, HI	ATC	97,100	(12/83)
19	Memphis, TN	ATC	94,300	(12/83)
20	Seattle, WA	Group W Cable	92,623	(12/83)
21	Central Islip, NY	Viacom Cablevision	92,529	(1/84)
22	Jefferson Parish/Kenner, LA	Cox Cable	91,530	(1/84)
23	Jacksonville, FL	Continental	90,500	(12/83)
24	Toledo, OH	Buckeye Cablevision	90,439	(1/84)
25	Manhattan, NY	Group W Cable	86,362	(12/83)
26	Englewood, CO	United Cable	85,384	(12/83)
27	San Francisco, CA	Viacom Cablevision	83,660	(1/84)
28	Greater San Juan, PR	Harris Cable	83,000	(12/83)
29	Grand Rapids, MI	General Electric	79,100	(1/84)
30	San Diego, CA	ATC	78,900	(12/83)
31	Wilmington, DE	Rollins Cable	78,800	(1/84)
32	Wichita, KA	Multimedia Cablevision	77,611	(12/83)
33	Dallas, TX	Warner Amex	76,059	(12/83)
34	Seattle, WA	Viacom Cablevision	74,793	(1/84)
35	Pittsburgh, PA	Warner Amex	72,045	(12/83)
36	Flint, MI	Comcast Cable	69,000	(1/84)
37	Richmond/Henrico County, VA	Continental	66,394	(1/84)
38	Phoenix, AZ	Times Mirror	65,709	(1/84)
39	South Bend, IN	Heritage	65,082	(1/84)
40	Omaha, NE	Cox Cable	64,949	(1/84)
41	Charlotte, N.C.	ATC	64,600	(12/83)
42	Cleveland Heights, OH	Viacom Cablevision	64,208	(1/84)
43	New Orleans, LA	Cox Cable	64,132	(1/84)
44	Baton Rouge, LA	Daniels & Associates	63,916	(1/84)
45	Suburban Tacoma, WA	Cable TV of Puget Sound	63,406	(1/84)
46	Louisville, KY	Times Mirror	63,213	(1/84)
47	Broward County, FL	Storer	63,000	(12/83)
48	Columbus, OH	Warner Amex	62,523	(12/83)
49	Santa Monica, CA	Group W Cable	62,000	(10/83)
50	Jefferson County, KY	Storer	62,100	(12/83)
51	Oklahoma City, OK	Cox Cable	61,155	(1/84)
52	Buffalo, NY	Cablescope	60,439	(1/84)
53	El Paso, TX	Group W Cable	60,198	(12/83)
54	Allentown, PA	Service Electric	60,000	(1/84)
55	Santa Barbara, CA	Cox Cable	59,352	(1/84)
56	Kansas City, MO	ATC	59,100	(12/83)
57	St. Petersburg, FL	Group W Cable	59,006	(12/83)
58	Snohomish County, WA	Viacom Cablevision	58,688	(1/84)
59	Allentown, PA	Twin County Cable	58,500	(8/83)
60	Akron, OH	Warner Amex	58,339	(12/83)
61	Pompano Beach, FL	American Cablesystems	58,000	(1/84)
62	Boston Complex (Malden), MA	Warner Amex	57,864	(7/83)
63	Monterey, CA	Western Communications	56,805	(1/84)
64	Harrisburg, PA	Sammons	56,793	(1/84)
65	Sarasota, FL	Storer Cable	55,800	(12/83)
66	Chicago Suburbs, IL	Cablevision System	55,000	(1/84)
67	New Britain, CT	United Cable	54,708	(12/83)
68	Hartford, CT	Times Mirror	54,526	(1/84)
69	Columbus, OH	Coaxial Communications	54,300	(1/84)
70	Des Moines, IA	Heritage Communications	53,437	(1/84)
71	Binghamton, NY	New Channels Corp.	53,401	(1/84)
72	Ft. Lauderdale, FL	Selkirk Communications	52,667	(1/84)
73	Port Arthur, TX	TCI	52,470	(12/83)
74	Indianapolis, IN	Wabash Cablevision	52,200	(12/83)
75	New Haven, CT	Storer	52,163	(12/83)
76	Las Vegas, NV	Times Mirror	52,130	(1/84)
77	Shreveport, LA	ATC	51,400	(12/83)
78	Bridgeport, CT	Cablevision Systems	51,160	(1/84)
79	Canton, OH	Warner Amex	51,086	(12/83)
80	Jackson, MS	ATC	50,700	(12/83)
81	Escondido/San Diego Cty., CA	Times Mirror	50,225	(1/84)
82	Westchester County, NY	UA Cablesystems	50,000	(1/84)
83	Reading, PA	ATC	50,000	(12/83)
84	San Rafael/Marin County, CA	Viacom Cablevision	49,897	(1/84)
85	Charleston, SC	Storer	49,800	(12/83)
86	Nashville, TN	Viacom	49,640	(1/84)
87	Chattanooga, TN	TeleScripps Cable	49,349	(1/84)
88	Atlanta, GA	Prime Cable	48,647	(12/83)
89	Lexington, KY	Telecable	48,145	(12/83)
90	Quint Cities	Cox Cable	48,093	(1/84)
91	Northridge, CA	Cable America	48,000	(1/84)
92	Peoria, IL	General Electric	48,000	(1/84)
93	Albuquerque, N.M.	Tribune Cable	47,439	(1/84)
94	Winston-Salem, NC	Summit Communications	47,368	(1/84)
95	Albany, NY	ATC	46,700	(12/83)
96	Worcester (Leicester), MA	Greater Media Inc.	46,608	(10/83)
97	Birmingham, AL	ATC	46,600	(12/83)
98	Hillsborough, FL	Group W	46,024	(12/83)
99	Fayetteville, NC	ATC	45,600	(12/83)
100	Spokane, WA	Cox Cable	45,576	(1/84)

Includes Orlando, FL and Melbourne, FL

Source: Subscriber counts are provided by MSOs and individual systems to Titsch Communications Inc.